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# Plastic Pipe: United States

October 2020



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# About This Report

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## Scope

This report forecasts to 2024 US plastic pipe demand in nominal US dollars at the manufacturer level. Total demand is segmented by resin in terms of:

- polyvinyl chloride (PVC)
- high density polyethylene (HDPE)
- crosslinked polyethylene (PEX)
- chlorinated polyvinyl chloride (CPVC)
- other resins such as fiberglass, acrylonitrile-butadiene-styrene (ABS), and polypropylene

Total demand is also segmented by market as follows:

- potable water
- storm and sanitary sewer
- conduit
- industrial processing
- other markets such as oil and natural gas; drain, waste, and vent; and irrigation

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Although distinctions are sometimes made between pipes and tubes, for the purposes of this report the terms “pipe”, “tube”, and “tubular products” are used interchangeably. Fittings are excluded from the scope of the report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Plastic Pipe: United States* (FF60034) is based on *Plastic Pipe*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

## About This Report

- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | NAICS & SIC Codes Related to Plastic Pipe

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
326122	Plastics pipe and pipe fitting manufacturing	3084	Plastics pipe

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

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historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Plastic Pipe*

### Freedonia Industry Studies

*Behind the Wall Plumbing*

*Global Electric Power Transmission & Distribution Equipment*

*Global Water Treatment Equipment & Chemicals*

*Lawn & Garden Watering Products*

*Pipe Products & Markets*

*Plumbing Fixtures & Fittings*

*Precast Concrete Products*

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*Construction: United States*

*Copper Pipe: United States*

*Natural Gas: United States*

*Oil & Natural Gas Pipe: United States*

*Plastics Processing Machinery: United States*

*Polyethylene: United States*

*Polypropylene: United States*

*Polyvinyl Chloride: United States*

*Steel Mill Products: United States*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*Chemical Week*

*ICIS Chemical Business*

*Journal of Light Construction*

*Oil & Gas Journal*

*Pipeline & Gas Journal*

*Plastics News*

*Trenchless Technology*

### Agencies & Associations

Alliance for PE Pipe

American Chemistry Council

Federal Energy Regulatory Commission

## About This Report

Fiberglass Tank & Pipe Institute

National Association of Home Builders

Plastic Pipe and Fittings Association

Plastics Pipe Institute (a division of the Society of the Plastics Industry)

Uni-Bell PVC Pipe Association

United States Census Bureau

United States Department of Agriculture

United States Energy Information Administration

United States Environmental Protection Agency

United States International Trade Commission